

IDEA CONSOLIDATED PART B/PRESCHOOL APPLICATION

E-GRANTS USER GUIDE

August 2008



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E-Grants System

This is a short instruction manual to help Special Education Part B Applicants navigate the system and enter data to complete and submit their Part B applications.

The applications must be submitted through the E-Grants System by **September 19, 2008.**

Authorized representatives should already have set up an E-Grants user account (last year's will still work if you are still at the same district). If not, find out how to get a user ID and password at:

<http://www.opi.mt.gov/PUB/PDF/Egrants/Security/08LEASecurityForm.pdf>

Questions regarding this process should be addressed to the OPI Help Desk at 406-444-3448.

Overview of E-Grants: <http://www.opi.mt.gov/PUB/PDF/Egrants/Training/08JuneOverview.pdf>

Video clips on E-grants topics: <http://opi.mt.gov/EGrants/VOD.html>

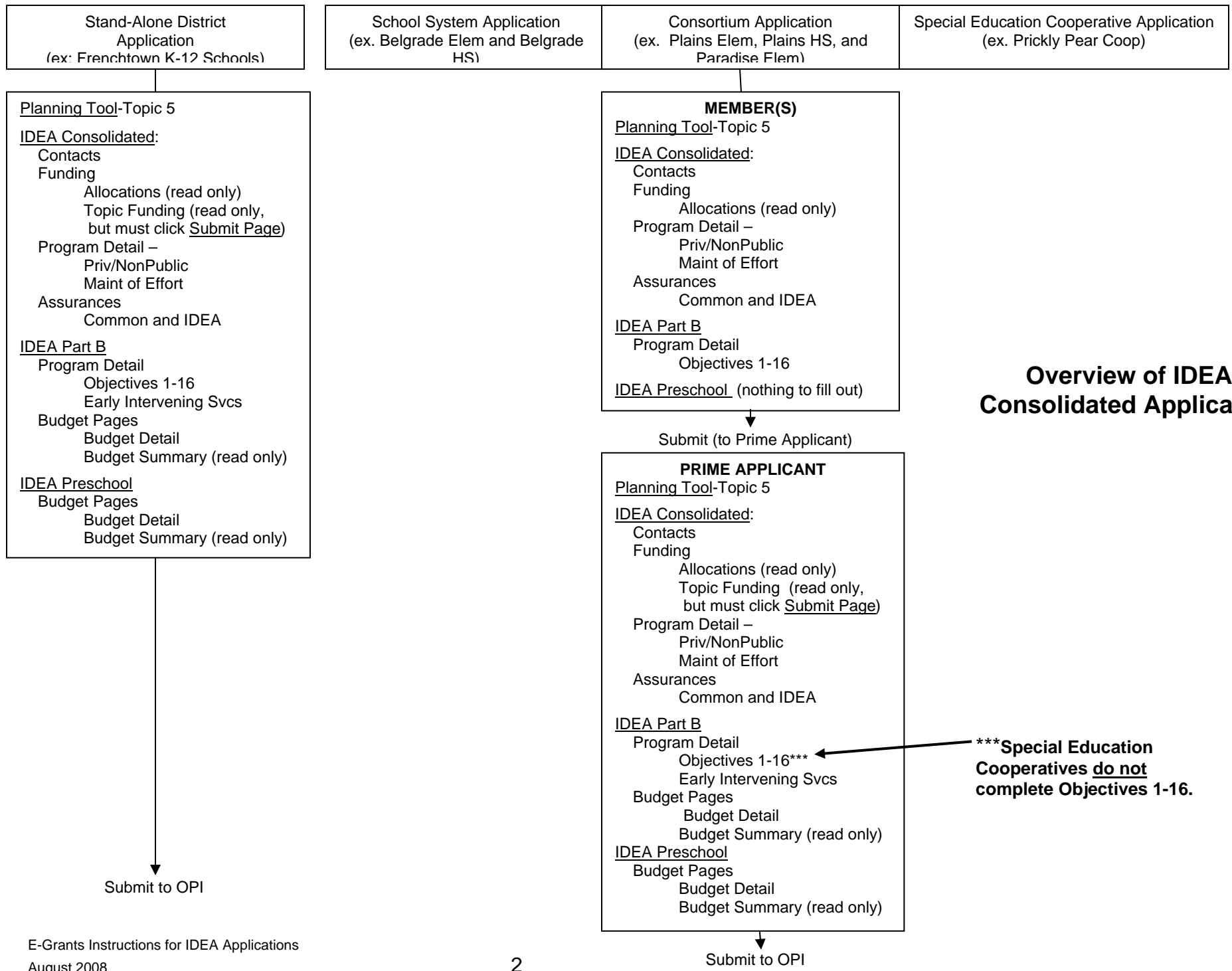
Information about Uses of IDEA Funds:

http://www.opi.mt.gov/PDF/SpecED/IDEA/Use_IDEAFunds.pdf

Setup of the E-grants application for the **Consolidated** IDEA Part B/Preschool application

- The user will be logged in as one of the following:
 - A special education cooperative (ex: Prickly Pear Cooperative), or
 - A member district of a special education cooperative
 - A district that is a prime applicant of a consortium (ex: Plains Elementary), or
 - A member district of a consortium (ex: Plains HS or Paradise Elem)
 - A school system prime applicant (ex: Belgrade Elementary), or
 - A member district of that system (ex: Belgrade HS)
 - A district that stands alone (ex: Frenchtown K-12 Schools)

The overview below shows sections of the application that must be completed for each type of user:



Tips for Navigating in the Application

There are several links in the **upper-right corner of each screen** that may be used at any time.

Application Sections **IDEA Consolidated** ▼
[Printer-Friendly](#)
[Click to Return to Application Select](#)
[Click to Return to Menu List / Sign Out](#)

[Click to Return to Application Select](#) - returns the user to the Application Select screen. At this screen the user may **Open** the application or access the **Print All** button (see instructions on page 14).

[Click to Return to Menu List](#) - This link returns the user to the list of options on the **Menu List** screen. Relevant options for the IDEA application are **IDEA Consolidated** and **Planning Tool**. This screen displays all grant applications the user has been given access to in the district's security set-up (cooperatives will have access only to IDEA applications).

[Sign Out](#) - This link logs the user out and returns to the login screen. **Always use this link when leaving the application.**

Each page within the application has a link in the upper-right corner of the page called **Instructions**. This link takes the user to an instruction sheet specific to that page. Please review the instructions for a page before calling the OPI with questions.

[Instructions](#)

All working pages within the application have a button called **Save Page**, which must be clicked to save any entries or changes made to the page. In some cases, the data on the page is prefilled from another part of the application, and no entries are made by the user. However, if there is a **Save Page** button, the user must click the button for the application to save the data in the current application. The button is usually found at the bottom of the page.

Save Page

Planning Tool

This section must be completed by ALL districts and cooperatives before the IDEA Consolidated Application can be completed. The Planning Tool may have already been completed for a district during completion of other federal grants. Instructions for completion are as follows:

OPI E-Grants System

OPI
Home

[Sign Out](#)

[Menu List](#)

[Instruction](#)

You have been granted access to the forms below by your Security Administrator

Competitive Grant
21st Century
Formula Grant
Carl Perkins - Secondary
ESEA / NCLB Consolidated
IDEA Consolidated
Title I School Improvement
Planning
Planning Tool
Discretionary Grant
Title I Part C - Regular Term
Title I Part C - Summer Term

The **Planning Tool** must be completed before accessing the IDEA Consolidated application.

If the form you need is not listed, contact your Security Coordinator :

See the Instructions for supported browsers and optimal screen resolution settings.

user ID: Charlesheron

Next Screen:

Create the new year's Planning Tool by Choosing the year and clicking "Add New Year" (new blank plan) or "Copy to New Year" (to copy last year's objectives, which can then be edited).

OPI E-Grants System OPI Home

Applicant Name: Hellgate Elem
Application: Planning Tool

Legal Entity: 0586

[Click to Return to Menu List / Sign Out](#)

Plan Selection

Would you like to add a new plan? 2009 Add New Year Copy to New Year

Open Address Issues Amend Delete View

Select	Plan(s)	Status	Status Date
2007-2008			
<input type="checkbox"/>	Original		
<input type="checkbox"/>	Opened	Started	5/16/2007 2:50:53 PM

Next Screen:

OPI E-Grants System OPI Home

Applicant Name: Charlo H S
Application: Planning Tool

Legal Entity: 1206

[Click to Return to Menu List / Sign Out](#)

Plan Selection

Open Address Issues Amend Delete View

Select	Plan(s)	Status	Status Date
2007-2008			
<input type="checkbox"/>	Original		
<input type="checkbox"/>	Opened	Started	4/26/2007 11:17:08 AM

Next Screen:

OPI E-Grants System OPI Home

Applicant Name: Charlo H S
Application: Planning Tool

Legal Entity: 1206

[Printer-Friendly](#)
[Click to Return to Plan Select](#)
[Click to Return to Menu List / Sign Out](#)

Planning Tool & Report Overview

The Planning Tool serves as the first step in developing an application for the E-grant system. This process establishes a comprehensive education planning process, the fiscal resources provided by federal and state programs and measures program activity.

There are two critical components of the Planning Tool:

- Topics** are established by OPI. Topics include broad areas of emphasis required by one or more state that are required under each federal program's regulations.
 - Topic 1: Improving Academic Achievement
 - Topic 2: Assuring Qualified Personnel
 - Topic 3: Improving Graduation Rates
 - Topic 4: Improving School Climate
 - Topic 5: Providing Education Appropriate to Students' Needs
 - Topic 6: Increasing Parent and Community Involvement
 - Topic 7: Providing Quality Career and Technical Education Programs
- Goals** are written by the applicant. An applicant must provide at least one and no more than five goals for which the applicant is eligible to apply. A model goal is listed for each topic.

The topics and district goals established in the Planning Tool carry forward into the appropriate information to develop objectives, activities and budget as related to the specific program.

Throughout the application development process and after submittal the applicant will be able to view and retain a report that provides an overview of selected topics, goals and objectives.

Next Screen:

Application: Planning Tool

Printer-Friendly
Click to Return to Plan Select
Click to Return to Menu List / Sign Out

Overview Topic 1 Topic 2 Topic 3 Topic 4 Topic 5 Topic 6 Topic 7

Topic 5 Goals Instructions

Topic 5: Providing Education Appropriate to Students' Needs

Programs that specifically address this Topic in their application [Program Detail pages](#):

- Title I, Part C Migrant - Regular
- Title I, Part C Migrant - Summer
- IDEA, Part B (Mandatory)
- IDEA, Preschool (Mandatory)

Districts are required to either select the Model Goal or define up to three additional district goals as well. District Goals are limited to:

☒ Goal 5.0 (IDEA/NCLB Model): All children with disabilities will receive appropriate education in the least restrictive environment.

Goal 5.1:

Goal 5.2:

Goal 5.3:

Save Page

After selecting or entering goals and saving the page, return to the **Menu List**.

Check the box for **Goal 5.0** to select the model goal, or enter goals in the text boxes marked "Goal 5.1," etc.

Remember to **Save Page** when page is completed.

IDEA Consolidated

This link will take you to the application. Review the **Instruction** links on each page for specific instructions on how to complete the page. If you do not see the IDEA Consolidated Application on this page, contact your Authorized representative to apply to OPI for access rights.

OPI E-Grants System

OPI Home

Sign Out

Menu List Instruction

You have been granted access to the forms below by your Security Administrator

- Competitive Grant
 - 21st Century
- Formula Grant
 - Carl Perkins - Secondary
 - ESEA / NCLB Consolidated
 - IDEA Consolidated
 - Title I School Improvement
- Planning
 - Planning Tool
- Discretionary Grant

The **IDEA Consolidated** menu option will take you to the IDEA application.

Next Screen:

Applicant Name: Hellgate Elem Legal Entity: 0586 [Click to Return to Menu List / Sign Out](#)

Application Select - IDEA Consolidated [Instruction](#)

Click the **2008-2009 IDEA Original Application** button.

Select an application from the list(s) below and press one of the following buttons:

Open Application Create Amendment Review Summary Payments Print All

Select	Application / Amendment	Original Submit Date	OPI Approval Date	Status	Status Date
2008-2009	09-IDEA-00 Original Application			Submitted	
2007-2008	08-IDEA-00 Amendment 1	04-22-2008	04-22-2008	Final Approved	04-22-2008
	08-IDEA-00 Original Application	09-07-2007	09-07-2007	Final Approved	09-07-2007

Then click **Open Application**.

Next Screen:

OPI E-Grants System

Applicant Name: Prickly Pear Coop Legal Entity: 9697 Application Sections: IDEA Consolidated

Application: 2007-2008 Original Application

There are three sections under **Application Sections**. All sections must be completed.

Application Sections: IDEA Consolidated, IDEA Consolidated, IDEA Part B, IDEA Preschool

Begin with **IDEA Consolidated**.

Overview Contact Information Funding Program Detail Assurances Submit Application History Page Lock Control

Click to Return to Application Select Click to Return to Menu List / Sign Out

Overview: This is the first of eight blue tabs across the top of the screen. The tab selected always shows in dark blue. The overview tab is read only and is a brief overview of the purpose of IDEA.

Contact Information:

This tab is the same for cooperatives, systems, consortiums, and districts. The **Authorized Representative** and **District Clerk** information is prefilled with data provided from the OPI.

Applicant Name: Hellgate Elem
Application: 2008-2009 Original Application
Legal Entity: 0586
Application Sections: IDEA Consolidated
Printer-Friendly
Click to Return to Application Select
Click to Return to Menu List / Sign Out

Overview | Contact Information | Funding | Program Detail | Assurances | Submit | Application History | Page Lock Control | Amendment Description

Contact Information [Instructions](#)

* Denotes required field

Authorized Representative:
Last Name: Reisig
First Name: Doug
Phone: 406 728 5626 Extension:
Fax: 406 728 5636
Summer Phone*: Extension:
Email: dreisig@hellgate.k12.mt.us

District Clerk:
Last Name: Mohl
First Name: Gayle
Phone: 406 728 5626 Extension:
Fax:
Summer Phone*: Extension:
Email:

[Save Page](#)

Summer Phone for Authorized Representative and District Clerk must be filled in.

The second half of the page provides the option to name someone other than the Authorized Representative as the IDEA Part B or IDEA Preschool contact person.

At the bottom of the page, enter up to 5 additional emails for people to receive notices regarding the grant. Remember to **Save Page** when all data are entered.

Funding - Allocations: (For specific information, click the **Instructions** link in the upper-right corner of the screen.)

The Allocations page is read only. The data are prefilled by the OPI. This page is different depending on whether the user is logged in as a **cooperative, prime applicant of a consortium or system, stand-alone district, or a member district.**

Overview | Contact Information | **Funding** | Program Detail | Assurances | Submit | Application History | Page Lock Control | Amendment Description

Allocations [Instructions](#)

	IDEAB	IDEAPRESCHL
Current Year Funds		
Allocation	\$227,674	\$11,240
ReAllocated (+)	\$0	\$0
Released (-)	\$0	\$0
Total Current Year Funds	\$227,674	\$11,240
Prior Year(s) Funds		
Carryover (+)	\$0	\$0
ReAllocated (+)	\$0	\$0
Total Prior Year(s) Funds	\$0	\$0
Sub Total	\$227,674	\$11,240
Multi-District		
Transfer In (+)	\$0	\$0
Transfer Out (-)	\$0	\$0
Administrative Agent		
Adjusted Sub Total	\$227,674	\$11,240
Total Available for Budgeting	\$227,674	\$11,240

Cooperative: Funds from member districts will show under **Transfer In** line item. The link under **Administrative Agent** will show a list of member districts and individual allocations.

Prime Applicant of a Consortium or System: The **Current-Year Funds** section will show the district allocation for the fiscal agent. The **Transfer In** line item will show the total allocation transferred in from member districts of the consortium or system and the **Adjusted Sub Total** will show the total of both. The link under **Administrative Agent** will show a list of member districts and individual allocations.

Stand-Alone District: The **Current-Year Funds** section will show the district's allocation. There will be no Transfer In or Transfer Out and the **Adjusted Sub Total** will be the district's allocation.

Member District: A district that is a member of a cooperative, consortium, or system will show **Current-Year Funds** in that section of the page and will show those same funds under the **Transfer Out** line item, with a zero balance for the **Adjusted Sub Total**. The link under **Administrative Agent** will show a list of member districts and individual allocations.

Funding - Topic Funding: (For specific information, click the **Instructions** link in the upper-right corner of the screen.)

This page is not available to districts that are members of a cooperative, consortium, or system. The page is read only. The data are linked to the Planning Tool and will show check marks under Topic 5. **Although this page does not require data entry, the page must be saved.**

	IDEAB	IDEAPRESCHL
Total Available for Budgeting	\$26,007	\$286
Topic Funding Indicate which programs will provide funding for each topic by checking the appropriate check boxes.		
Topic 1: Improving Academic Achievement	<input type="checkbox"/>	<input type="checkbox"/>
Topic 2: Assuring Qualified Personnel	<input type="checkbox"/>	<input type="checkbox"/>
Topic 3: Improving Graduation Rates	<input type="checkbox"/>	<input type="checkbox"/>
Topic 4: Improving School Climate	<input type="checkbox"/>	<input type="checkbox"/>
Topic 5: Providing Education Appropriate to Students' Needs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Topic 6: Increasing Parent and Community Involvement	<input type="checkbox"/>	<input type="checkbox"/>
Topic 7: Providing Quality Career and Technical Education Programs	<input type="checkbox"/>	<input type="checkbox"/>
	IDEAB	IDEAPRESCHL

Save Page

Although nothing is entered by the user on this page, the page must be saved in this application. Click **Save Page**.

Topic 5 will show a check mark.

Program Detail - Private/Nonpublic Schools: (For specific information, click the **Instructions** link in the upper-right corner of the screen).

District: If a district (fiscal agent, member district or stand-alone district) answers **Yes**, then the fields that are not grayed out must be completed. Imported data or calculated data in this screen are shown in the grayed-out fields.

The button at the bottom of the screen - **Calculate Totals** - will calculate the proportionate share of the allocation that must be spent on private/nonpublic school children. Remember to **Save Page**.

Overview	Contact Information	Funding	Program Detail	Assurances, Common and Program	Submit	Application History	Page Lock Control
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Private/Nonpublic Schools Proportionate Share [Instructions](#)

Are there IDEA-eligible children parentally enrolled in private/nonpublic elementary/secondary schools within your district boundaries?

☒ Yes ☐ No

Proportionate share is calculated based on base payment and poverty/enrollment

Proportionate Share IDEA Preschool (619)

Total number of IDEA eligible children in private/nonpublic elementary/secondary schools age 5.	2
Total number of IDEA eligible preschool children in public school.	
Total number of IDEA eligible in public and private/nonpublic schools.	2
IDEA 619 allocation for the school district (Base + Poverty Enrollment)	1
Proportionate share of allocation which must be spent on services to IDEA eligible private/nonpublic children.	1

IDEA Part B (611) Proportionate Share

Total number of IDEA eligible children in private/nonpublic elementary/secondary schools age 5-21.	25
Total number of IDEA eligible public school children	
Total number of IDEA eligible in public and private/nonpublic	25
IDEA 611 allocation for the school district (Base + Poverty Enrollment)	496
Proportionate share of allocation which must be spent on services to IDEA eligible private/nonpublic children.	496

Date of Consultation Meeting (MM/DD/YYYY): 12/10/2006

Basis used to Select Students to be Served: (At least one required if Students Receiving Services entered above)

☐ Number ☐ Need ☒ Other [vfaj ;iojw]

Services to be Provided by LEA: (At least one required if Students Receiving Services entered above)

☐ Speech Therapy ☐ Occupational Therapy ☒ Physical Therapy ☐ Instructional Services ☐ Other

Where Services will be Provided: (At least one required if Students Receiving Services entered above)

☐ Public ☐ Private/Nonpublic ☒ Other [ejthy]

Are there any differences in program benefit for the public and private/nonpublic school students? (Required if Students Receiving Services entered above)

☐ Yes ☒ No

Briefly explain the differences.(500 Character Maximum)

[Calculate Totals](#) [Save Page](#)

Cooperative: This page is read only for a cooperative. The data are a roll-up of member districts' data and will show only after member districts have submitted their applications And the cooperative host has accepted the member applications.

Private/Nonpublic Schools Proportionate Share [Instructions](#)

Proportionate share is calculated based on base payment and poverty/enrollment

The following shows the proportionate share data rolled-up from the member applications for Consortiums and Cooperatives. Cooperatives do not provide this data on their own so will not see the data entry portion of this screen below the roll-up summary and will have blank Prime Applicant values.

The data from each member's application are included in the Roll-up ONLY AFTER their subgrant application has been "Approved" by the Prime Applicant to be part of this overall application. A member's application is approved by the Prime Applicant by going to the Allocation page and clicking on the member's LE Code in the list. The LE Code becomes a hyperlink when the member submits their application to the Prime Applicant. Once the Prime Applicant has reviewed the member's application they can approve it on the member application Submit page.

NOTE: When member applications are approved this page will need to be saved to update the roll-up Totals.

Proportionate Share IDEA Preschool (619)	Prime Applicant (Consortium)	Member Roll-up	Totals
Total number of IDEA eligible children in private/nonpublic elementary/secondary schools age 5.	3	0	3
Proportionate share of allocation which must be spent on services to IDEA eligible private/nonpublic children.	0	0	0
Proportionate Share IDEA Part B (611)			
Total number of IDEA eligible children in private/nonpublic elementary/secondary schools age 5-21.	2	0	0
Proportionate share of allocation which must be spent on services to IDEA eligible private/nonpublic children.	925	0	0

Fiscal Agent of a Consortium or System: The fiscal agent will see the roll-up screen (same screen as a cooperative, above) which will show member districts' data after the districts have submitted their applications. The fiscal agent must also enter data for its district. The fiscal agent's data will roll-up into the Prime Applicant (Consortium) column.

Program Detail – Maintenance of Effort: (For specific information, click the **Instructions** link in the upper-right corner of the screen).

Districts: Number (1) is prefilled with the district's 2006-07 school year expenditures. The district must enter the 2008-09 ensuing school year budget in number (2). Remember to **Save Page**.

Overview	Contact Information	Funding	Program Detail	Assurances, Common and Program	Submit	Application History	Page Lock Control
Private/Nonpublic Schools				Maintenance of Effort			

Maintenance of Fiscal Effort [Instructions](#)

(1) 2005-2006 school year expenditures - Total amount of state and local funds expended for special education.

(2) 2007-2008 ensuing school year budget - Total amount of state and local funds budgeted for special education [300.231(c)]. *

* If the applicant is budgeting less than the amount expended in school year 2005-2006, the applicant must provide an explanation for the reduction. Reductions must be in compliance with 300.232 and/or 200.233. (1000 Character Maximum)

[Save Page](#)

Cooperative, Prime Applicant of a Consortium or System, or Stand-Alone District: Number (1) is prefilled with the sum total of the applicant's and its participating members' 2006-07 school year expenditures. Number (2) is prefilled with data from member districts after they have submitted their applications and the host has accepted their applications. Number (3) must be filled in by the Fiscal Agent. If the total, number (4), is less than number (1), then an explanation must be provided in the text box. Remember to **Save Page**.

Overview	Contact Information	Funding	Program Detail	Assurances	Submit	Application History	Page Lock Control
Private/Nonpublic Schools				Maintenance of Effort			

Maintenance of Fiscal Effort [Instructions](#)

(1) 2005-2006 school year expenditures - Total amount of state and local funds expended for special education.

(2) 2007-2008 funds budgeted by Cooperative or Consortium Members (if applicable)

(3) 2007-2008 ensuing school year budget - Total amount of state and local funds budgeted for special education [300.231(c)].

(4) 2007-2008 Total of Prime Applicant/Administrative Agent and Members funds budgeted (2 + 3) *

* If the applicant is budgeting less than the amount expended in school year 2005-2006 (line 4 is less than line 1), the applicant must provide an explanation for the reduction.Reductions must be in compliance with 300.232 and/or 200.233.(1000 Character Maximum)

Just because

Assurances: (For specific information, click the **Instructions** link in the upper-right corner of the screen).

Only a user with rights as an Authorized Representative can complete the Assurances pages. The assurances must be completed prior to submittal.

Each page under Assurances (**Common Assurances** and **IDEA Assurances**) must be checked. Also check to indicate agreement at bottom of page.

On the third page, **Assurances**, the user must click the button at the bottom of the page, **Legal Entity Agrees**.

IDEA Part B

This section of the application has program detail and, for a prime applicant, the budget pages for IDEA Part B.

Click **IDEA Part B** from the **Application Sections** pull-down menu in the upper-right corner of the screen.

Program Detail – Objectives: (For specific information, click the **Instructions** link in the upper-right corner of the screen.)

Districts: All districts (prime applicants, member districts, stand-alone districts) must complete the **Program Detail** tab. (Special Education Cooperatives will not complete this section.)

Each page under **Program Detail** consists of **Objectives** that have been prefilled with performance and attainment of target levels (Yes/No buttons). If the district has not met the targets in the objective, then the district must check an activity (if "Other" is checked, an explanation must be provided). Remember to **Save Page** for each of the pages.

Program Detail – Early Intervening Services: (For specific information, click the **Instructions** link in the upper-right corner of the screen.)

Fiscal Agent
(district that is a prime applicant of a consortium or system, stand-alone district, or a cooperative): This page is not available to a district that is a member of a cooperative, consortium, or system.

Member District	Case of Significant Disproportionality	District Allocation - Base Payment + Poverty Enrollment	Amount to be used for EIS. (15% required for Districts with Case of Disproportionality)	Use of EIS Funds
Pryor Elem	N	\$30,133	0	<input type="checkbox"/> Professional Development <input type="checkbox"/> Educational and behavioral evaluations, services, and supports, including scientifically based literacy instruction
Red Lodge Elem	N	\$51	0	<input type="checkbox"/> Professional Development <input type="checkbox"/> Educational and behavioral evaluations, services, and supports, including scientifically based literacy instruction
Red Lodge H S			0	<input type="checkbox"/> Professional Development <input type="checkbox"/> Educational and behavioral evaluations, services, and supports, including scientifically based literacy instruction

Enter data, if any, **Calculate Totals** and **Save Page**.

Validation checks will not allow incorrect data to be entered.

Budget Pages – Budget Detail: (For specific information, click the **Instructions** link in the upper-right corner of the screen.) This tab is not available to a district that is a member of a cooperative, consortium, or system.

Fiscal Agent:
(district that is a fiscal agent of a consortium or system, stand-alone district, or cooperative):

OPI E-Grants System

Applicant Name: Yellowstone/W Carbon Coop Legal Entity: 9707 Application Sections: IDEA Part B

Application: 2008-2009 Original Application

The application has been approved. No more updates will be saved for the application.

Budget Detail BUDGET BREAKDOWN (Use whole dollars only. Omit Decimal Places, e.g., 2536)

Total Allocation Available for Budgeting \$1,007,517

Purpose Category	100 Personal Service-Salaries	200 Employee Benefits	300 Purchased Professional and Technical	400 Purchased Property Services	500 Other Purchased Services	600 Supplies	700 Property & Equipment	800 Other Objects	900 Transfers
10-Instruction	10000	52	0	0	0	0	5000	0	1000
20-Support Services	10000	2	981463	0	0	0	0	0	0
Sub Total	\$20,000	\$54	\$981,463	\$0	\$0	\$0	\$5,000	\$0	\$1,000

TOTALS \$20,000 \$1,000

Total allocation is prefilled in (A) at the bottom of the page.

After entering the budget items under appropriate categories and entering (G) Budgeted Indirect Costs, if appropriate, click **Calculate Totals** at the bottom of the page. The total budget (H) should not exceed the allocation amount (A). Allocation Remaining at bottom of page must equal zero. Remember to **Save Page** when finished.

TOTALS	\$20,000	\$54	\$981,463	\$0	\$0	\$0	\$5,000	\$0	\$1,000
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Determining Maximum Indirect Cost allowed

(A) Total Allocation Available for Budgeting	\$1,007,517	(F) Total budgeted above	\$1,007,517
(B) Budgeted Property and Equipment Cost (Object 700)	\$5,000	(G) Budgeted Indirect Cost	0
(C) Allowable Direct Costs (A-B)	\$1,002,517	(H) Total Budget (F+G)	\$1,007,517
(D) Indirect Cost Rate %	0.0000	Allocation Remaining (A-H)	\$0
(E) Maximum Indirect Cost (C*(D/1+D))	\$0		

Calculate Totals

Budget Pages – Budget Summary: (For specific information, click the **Instructions** link in the upper-right corner of the screen.)

Fiscal Agent
(district that is a fiscal agent of a consortium or system, stand-alone district, or cooperative):
This page is Read Only.

The page displays a summary of all the details entered on the **Budget Detail** page. To make changes, return to the **Budget Detail** page.

Overview		Program Detail		Budget Pages		Page Lock Control	
Budget Detail				Budget Summary			

Budget (Read Only)											Instructions
Code	Purpose Category	100 Personal Service-Salaries	200 Employee Benefits	300 Purchased Professional and Technical	400 Purchased Property Services	500 Other Purchased Services	600 Supplies	700 Property & Equipment	800 Other Objects	900 Transfers	TOTAL
10	Instruction	161,007									161,007 100.00 %
20	Support Services										
21	Parental/Family Involvement										
22	Professional Development										
23	Administration										
27	Pupil Transportation										
33	School and Community Support										
40	Facilities										
Total Direct Costs		161,007 100.00 %									161,007
Approved Indirect Costs X 0.0300%											
Total Budget											161,007

IDEA Preschool

This section of the application has the budget pages for a prime applicant (district that is a fiscal agent of a consortium or system, stand-alone district, or cooperative).

Click **IDEA Preschool** from the **Application Sections** pull-down menu in the upper- right corner of the screen. **Budget Detail** tab and **Budget Summary** tab work the same as for IDEA Part B (see instructions above, page 12).

The screenshot shows the OPI E-Grants System interface. At the top, it says "OPI E-Grants System" and "OPI Home". Below this, it displays "Applicant Name: Prickly Pear Coop", "Legal Entity: 9697", and "Application: 2007-2008 Original Application". On the right, there is a pull-down menu for "Application Sections" with options: "IDEA Consolidated", "IDEA Part B", and "IDEA Preschool". The "IDEA Preschool" option is circled. Below the menu, there are links: "Click to Return to Application Select" and "Click to Return to Menu List / Sign Out". At the bottom, there is a navigation bar with tabs: "Overview", "Contact Information", "Funding", "Program Detail", "Assurances", "Submit", "Application History", and "Page Lock Control".

Submit: Return to the Application Section called **IDEA Consolidated**. (For specific information, click the **Instructions** link in the upper-right corner of the screen.) **A cooperative, consortium or system cannot submit until all member districts have submitted their applications.**

The screenshot shows the OPI E-Grants System interface for the "IDEA Consolidated" section. It displays "Applicant Name: Prickly Pear Coop", "Legal Entity: 9697", and "Application: 2007-2008 Original Application". On the right, there is a pull-down menu for "Application Sections" with options: "IDEA Consolidated", "Printer-Friendly", "Click to Return to Application Select", and "Click to Return to Menu List / Sign Out". The "IDEA Consolidated" option is circled. Below the menu, there are links: "Click to Return to Application Select" and "Click to Return to Menu List / Sign Out". At the bottom, there is a navigation bar with tabs: "Overview", "Contact Information", "Funding", "Program Detail", "Assurances", "Submit", "Application History", and "Page Lock Control".

All Users: On the Submit tab, the **Consistency Check** must be successfully run prior to submittal. After the check has been completed, a list of errors, if any, will display. After correcting the errors, run the check again until no errors show. When no errors are found, the **Submit** button will display. (Authorized Representatives only). A red statement will appear that states that the application has been locked.

The **Lock Application** button prevents any changes to be made to the application. Only the person who locked the application (or the Authorized Representative) can unlock the application.

The screenshot shows the OPI E-Grants System interface for the "Submit" tab. It displays "Applicant Name: Superior K-12 Schools", "Legal Entity: 0579", and "Application: 2008-2009 Original Application". On the right, there is a pull-down menu for "Application Sections" with options: "IDEA Consolidated", "Printer-Friendly", "Click to Return to Application Select", and "Click to Return to Menu List / Sign Out". The "IDEA Consolidated" option is circled. Below the menu, there are links: "Click to Return to Application Select" and "Click to Return to Menu List / Sign Out". At the bottom, there is a navigation bar with tabs: "Overview", "Contact Information", "Funding", "Program Detail", "Assurances, Common and Program", "Submit", "Application History", "Amendment Description", and "Page Lock Control". The "Submit" tab is selected. Below the navigation bar, there is a red message: "The Consistency Check must be successfully processed before you can submit your application." Below this message, there are three buttons: "Consistency Check", "Lock Application", and "Unlock Application". The "Consistency Check" button is circled. A callout box points to the "Consistency Check" button with the text: "Click 'Consistency Check' to check for errors before submitting".

Print:

The **Print All** button is found on the **Application Select** screen.

Because the document is large, the process for printing is completed overnight.

Note: It is critical that pop-up blockers be turned off in order to complete this process.

The requestor will receive two e-mails: when the request is made and when the document is ready for printing. A record will remain on the application indicating date and name of the requestor. The name and date of the requestor will show as **blue type** when the document is ready for printing. Click on the blue name to open a new window that will allow for saving the document and selecting the printer. See instructions at: <http://www.opi.mt.gov/pdf/egrants/Training/PrintAllFunction.pdf> , Print-All Function Instruction document.

The screenshot shows the 'Application Select - IDEA Consolidated' screen. At the top, it displays 'Applicant Name: Charlo H S' and 'Legal Entity: 1206'. A link 'Click to Return to Menu List / Sign Out' is in the top right. Below the header, there's a section with instructions: 'Select an application from the list(s) below and press one of the following buttons:'. There are five buttons: 'Open Application', 'Create Amendment', 'Review Summary', 'Payments', and 'Print All'. The 'Print All' button is circled in red. Below the buttons is a table with columns: 'Select', 'Application / Amendment', 'Original Submit Date', 'OPI Approval Date', 'Status', 'Status Date', and 'Consulting'. The table has one row with the application '08-IDEA-00 Original Application' and status 'Not Submitted'. The name 'Charlo H S' is visible in blue text in the 'Application / Amendment' column.

Select	Application / Amendment	Original Submit Date	OPI Approval Date	Status	Status Date	Consulting
2007-2008	08-IDEA-00 Original Application			Not Submitted		

Submit Procedures For Districts Participating In A System, Consortium Or Special Education Cooperative Application

All districts participating in an IDEA Part B/Preschool Consolidated Application must submit their completed portion of the application to the fiscal host for review and approval. The fiscal host will not be able to submit its application to the OPI for approval until the fiscal agent approves each and every participating district's portion of the application. Following is a description of how a participating district's authorized representative submits its portion of the application to the fiscal host for review and approval.

1. Review the application to ensure all required portions of the application have been completed.
 - Contact Information
 - Assurances
 - Program Detail: Private/Nonpublic Schools, MOE, Objectives
2. Click on the Submit Tab
3. Click on the Consistency Check Button

Caution: This check may take a few minutes to complete. The application cannot be submitted until this has been successfully completed. After the check has been completed, a message will display indicating that the Consistency Check was completed successfully (no errors were found) or a list of errors encountered will display. After correcting any errors, complete the check again until no errors are detected. If no errors are found, the appropriate button will display so that the application can be submitted to the fiscal host. It may be necessary to scroll down the page to see the button(s).

4. Click on the "Submit to Administrative Agent" button.

Fiscal Agent Review And Approval Procedures For Participating Member Applications

All districts participating in an IDEA Part B/Preschool Consolidated Application as a part of a system, special education cooperative or consortium must complete and submit their IDEA Part B/Preschool Consolidated Application to the fiscal host for review and approval. The prime applicant (fiscal host) of the consortium, system or special education cooperative must approve each and all participating member applications to allow data from those applications to roll-up into the consortium's, system's or cooperative's application.

To approve the application of a member district, the prime applicant (fiscal host) of the system, consortium or special education cooperative must do the following:

Steps for Approving Member Applications:

- 1.** The fiscal host for the application of the system, consortium or cooperative application, must go to the Funding Tab. This takes you to the "Allocations" page.
- 2.** On the Allocations page, click the blue link under "Administrative Agent." (This is a 7-digit number, such as "0241200".) The Administrative Agent page opens. The Administrative Agent page shows allocations for all participating members. If a member has submitted their application, the LE number at the left-hand column is highlighted, and the far-right-hand column will say "Submitted to AA."
- 3.** Open a member application by clicking on the highlighted LE number. This will take you to the "Application Select" screen for the member.
- 4.** Click the radio button next to the application you want to review, and click <Open Application>.
- 5.** Review the member application's contents. You will not be able to change any fields.
- 6.** Go to the member's Submit page. Click <Approve> or <Disapprove>. If approved, the data will populate the consortium's or cooperative's application. If disapproved, the application goes back to the member for changes and the member will have to resubmit their revised portion of the application to the prime applicant (fiscal host) again for review and approval.
- 7.** To exit from the member's application, click on the red X on the top right-hand- corner of the screen. This will close the member's application and take you back to your application screen which shows all of the member districts and the status of their applications (submitted/not submitted/disapproved/approved).
- 8.** After approving all member applications using steps 1-7 above and after completing all pages and budgets of the fiscal host (prime applicant) application, click on the Submit Tab, click on Consistency Check, fix all errors until the Consistency Check runs without errors, and click on <Submit to OPI>. E-grants will send the OPI an e-mail stating the application is submitted and ready for the OPI review.

Overview of Submission Process and Submit Page Information

The Submit Page offers several features and shows information about the status of the application in the approval process.

The sequence of submissions for IDEA is:

1. District Data Entry person (optional)
2. District Authorized Representative
3. Administrative Agent (i.e., consortium host, cooperative, system prime applicant)
Data Entry person (Optional)
4. Administrative Agent (i.e., consortium host, cooperative, system prime applicant)
Authorized Representative
5. OPI

After the member of a system, consortium or cooperative submits their application to the Administrative Agent (Fiscal Host), the Administrative Agent will approve or disapprove the member's application. After the prime applicant's (Fiscal Host) application is submitted to the OPI, the IDEA Part B Program Manager will review the application for completeness and consistency with IDEA program requirements.

These items appear on the Submit page:

Lock Application Button/Unlock Application Button

Anyone with data entry authority within the district has the ability to lock an application. Locking an application prevents any changes to be made to the application. This might be appropriate if, for example, there had been some concern about multiple people updating an application when, in fact, was undesired at the district level. Therefore, by locking the application no one can make changes to it. Only the person who locked the application or a person with district administrative access (e.g., authorized representative) can unlock it.

To lock the application, press "Lock Application" button. To unlock the application, press the "Unlock Application" button.

Assurances were agreed to on (mm/dd/yyyy). The date will display after the Authorized Representative agrees to all assurances and presses the **Save Page** button on the NCLB and IDEA Certification and Assurances pages.

Consistency Check was run on (mm/dd/yyyy). The date will display after the "Consistency Check" has been run successfully. If the "Consistency Check" ***did encounter errors***, the error message will prompt what needs to be corrected. After correcting any errors, run the check again until no errors are detected. If the "Consistency Check" ***did not encounter any errors***, the application will then be locked until the person is ready to submit it to the next level for approval (refer to Lock Application/Unlock Application buttons).

The LEA Data Entry submitted the application on (mm/dd/yyyy). The "Submit for Review" button will appear after the "Consistency Check" has been completed successfully. When the Data Entry person is ready to forward the application to the Authorized Representative, press the "Submit for Review" button. The application will then be forwarded to the next appropriate level of approval and the submit date will appear. E-Grants will send an email to the Authorized Representative notifying them that the application has been submitted and is ready for their review.

The LEA Administrator submitted the application on (mm/dd/yyyy).

The Authorized Representative is the only person who can submit the application. Click on “Submit to Administrative Agent” or “Disapprove.”

Final Application Review (mm/dd/yyyy). This date appears after an application is approved by the OPI IDEA Program Manager.